

The Norwegian EV success continues

Christina Bu, Secretary General

Norwegian EV Association

christina@elbil.no

Twitter: [ChristinaBu_](https://twitter.com/ChristinaBu_)

www.elbil.no

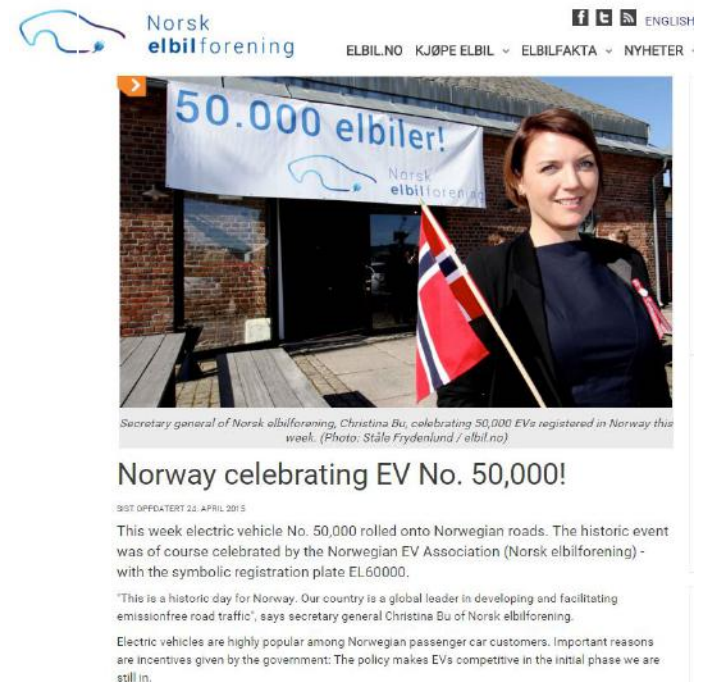


Norwegian EV Association

The Norwegian EV Association –

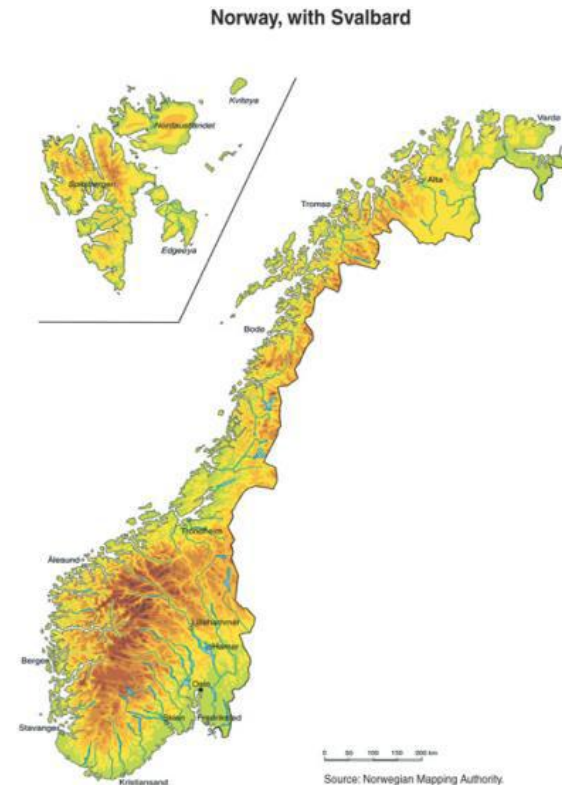
worlds' largest EV owner Association

- NGO and member organization promoting renewable electric transport
- 35.000 members
- 12 employees
- Unique experience in small market with the largest share of battery electric vehicles in the world
- Valuable input to policy makers and EV industry



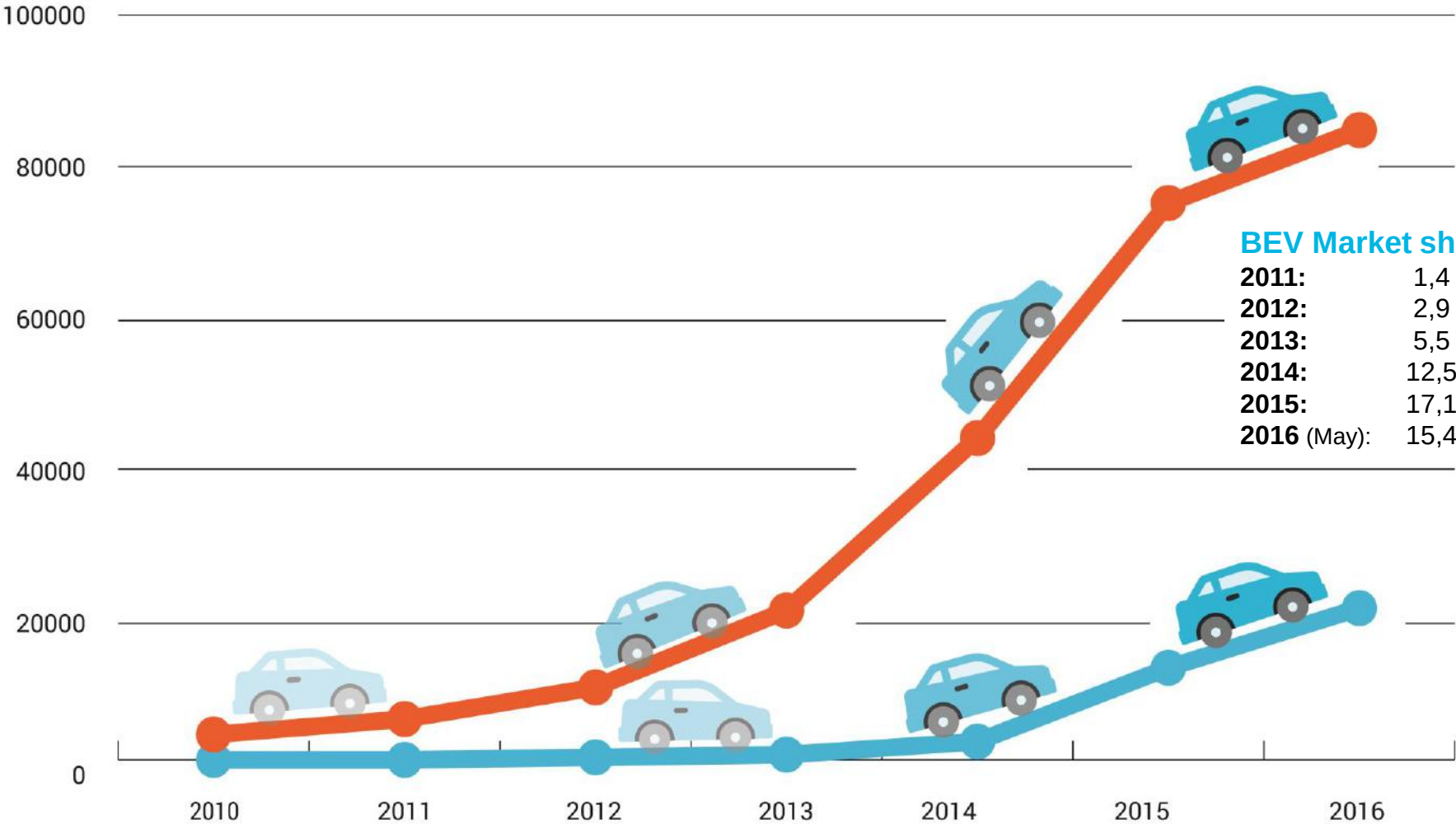
Norway

- System of Government:
Constitutional monarchy
Parliamentary democracy
- 19 counties, 429 municipalities
- Area (mainland): 323 278 km²
- Population: 5,2 million people
- Cars: 2,6 million
- High income country, population fast implementers of new technologies
- 95 % hydroelectric electricity production, in balance today, surplus expected up to 2020



Electric vehicle fleet in Norway

BEV PHEV



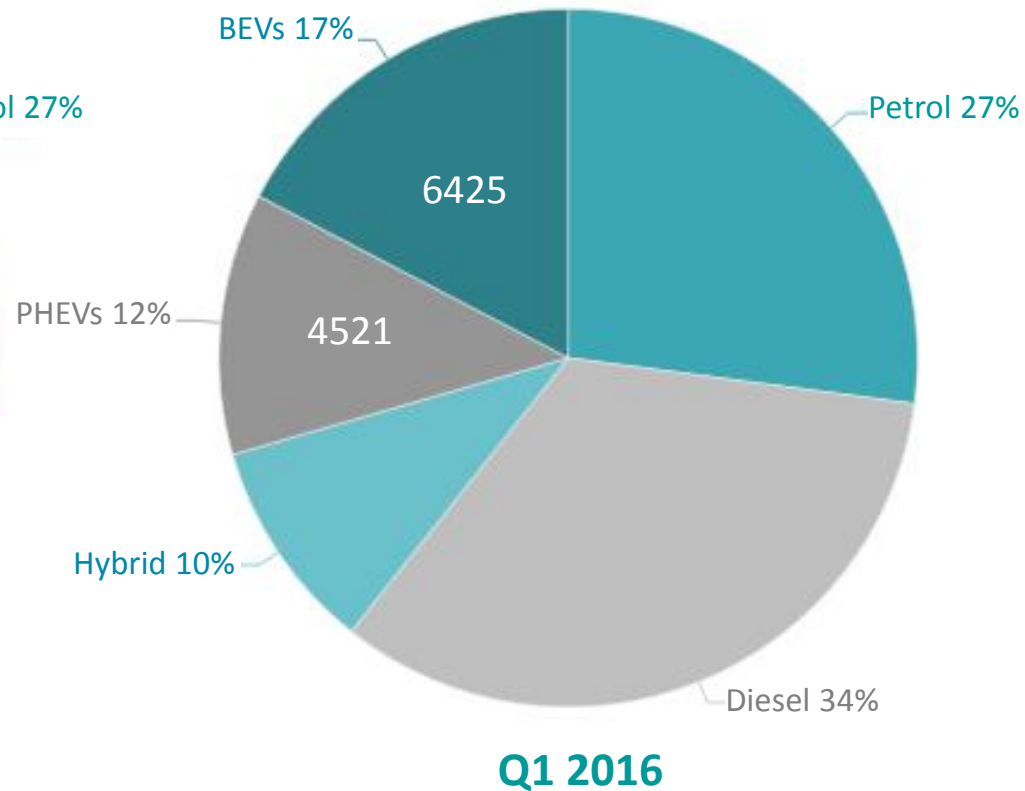
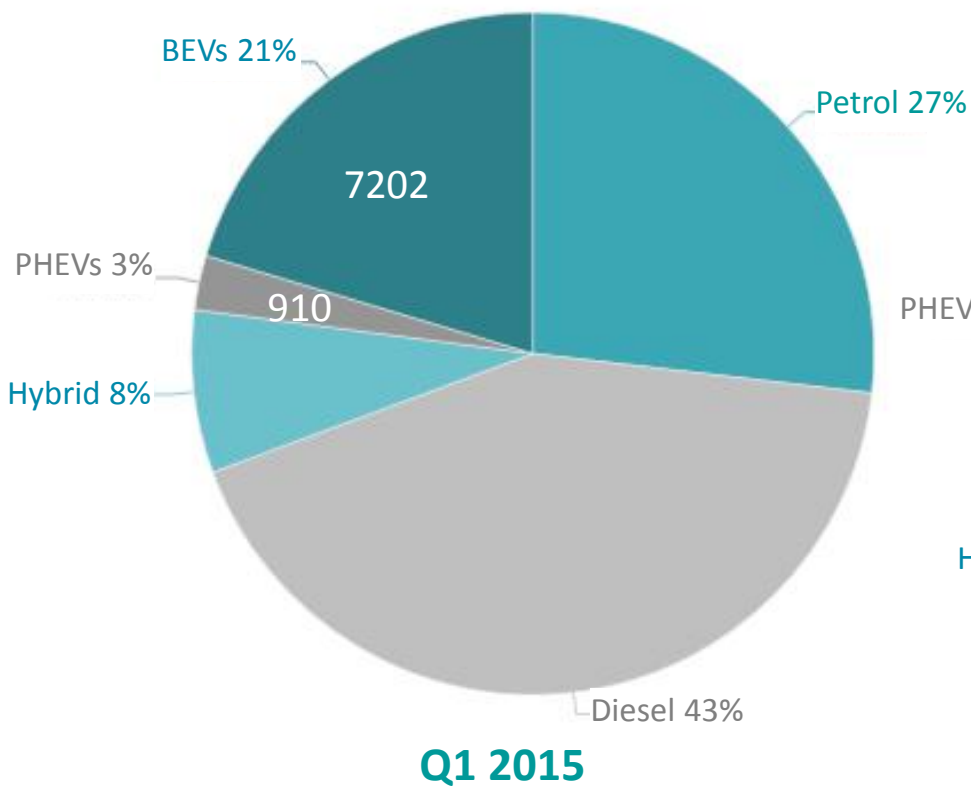
BEV Market share:

2011:	1,4 %
2012:	2,9 %
2013:	5,5 %
2014:	12,5 %
2015:	17,1 %
2016 (May):	15,4 %



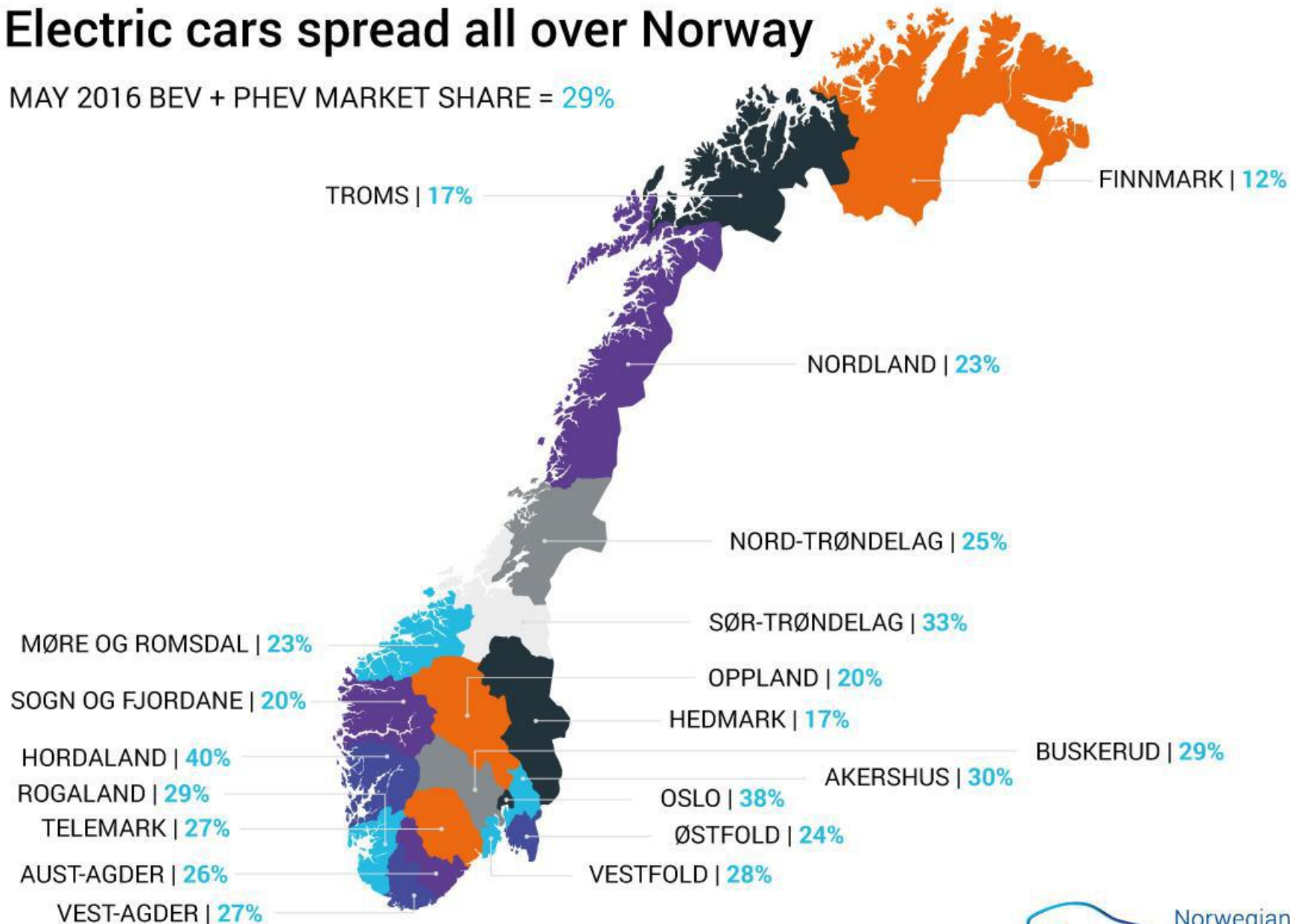
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New car sales Q1 2015 and 2016



Electric cars spread all over Norway

MAY 2016 BEV + PHEV MARKET SHARE = 29%

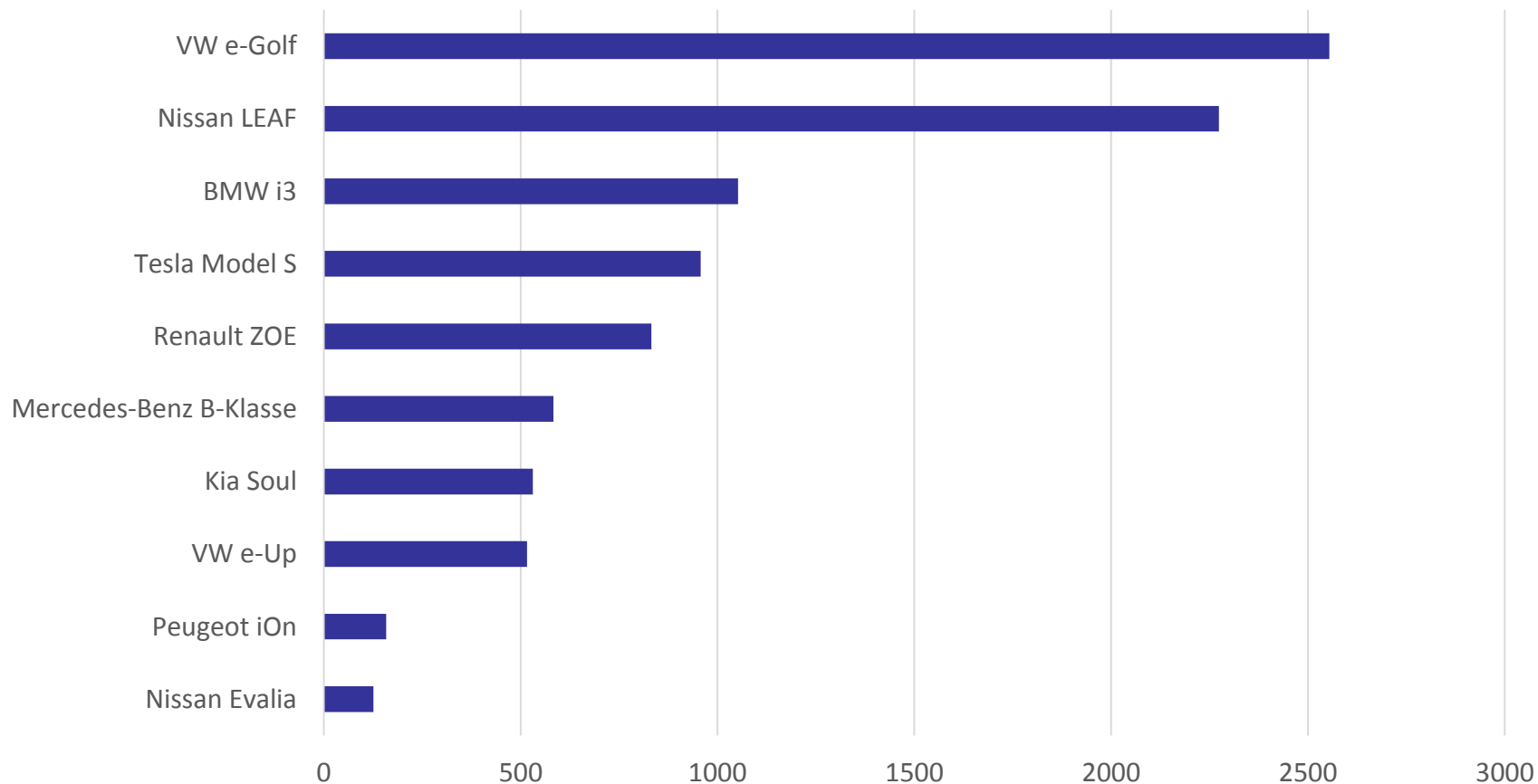


Source: OFV



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Top selling BEV models Jan-May 2016



Norwegian EV policy

- No purchase taxes (extremely high for ordinary cars)
- Exemption from 25% VAT on purchase and leasing
- Low annual road tax
- No charges on toll roads or ferries
- Free municipal parking
- Access to bus lanes
- 50 % reduced company car tax



Prices and market shares in Nordic countries

	SWEDEN		DENMARK		NORWAY	
	Price starting at (SEK)	Registrations 2015	Price starting at (DKK)	Registrations 2015	Price starting at (NOK)	Registrations 2015
Market size, Golf		23057		4760		16388
VW Golf	174,900	22779	209,177	4668	265,900	7445
VW e-Golf	346,900	278	309,624	92	262,000	8943
e-Golf price vs. fossil Golf	98%		48%		-1%	
e-Golf's share of all Golf		1%		4%		55%



Rush hour bus lane in Oslo before change



The average EV owner gives the electric car 4 out of 5 «smilies»

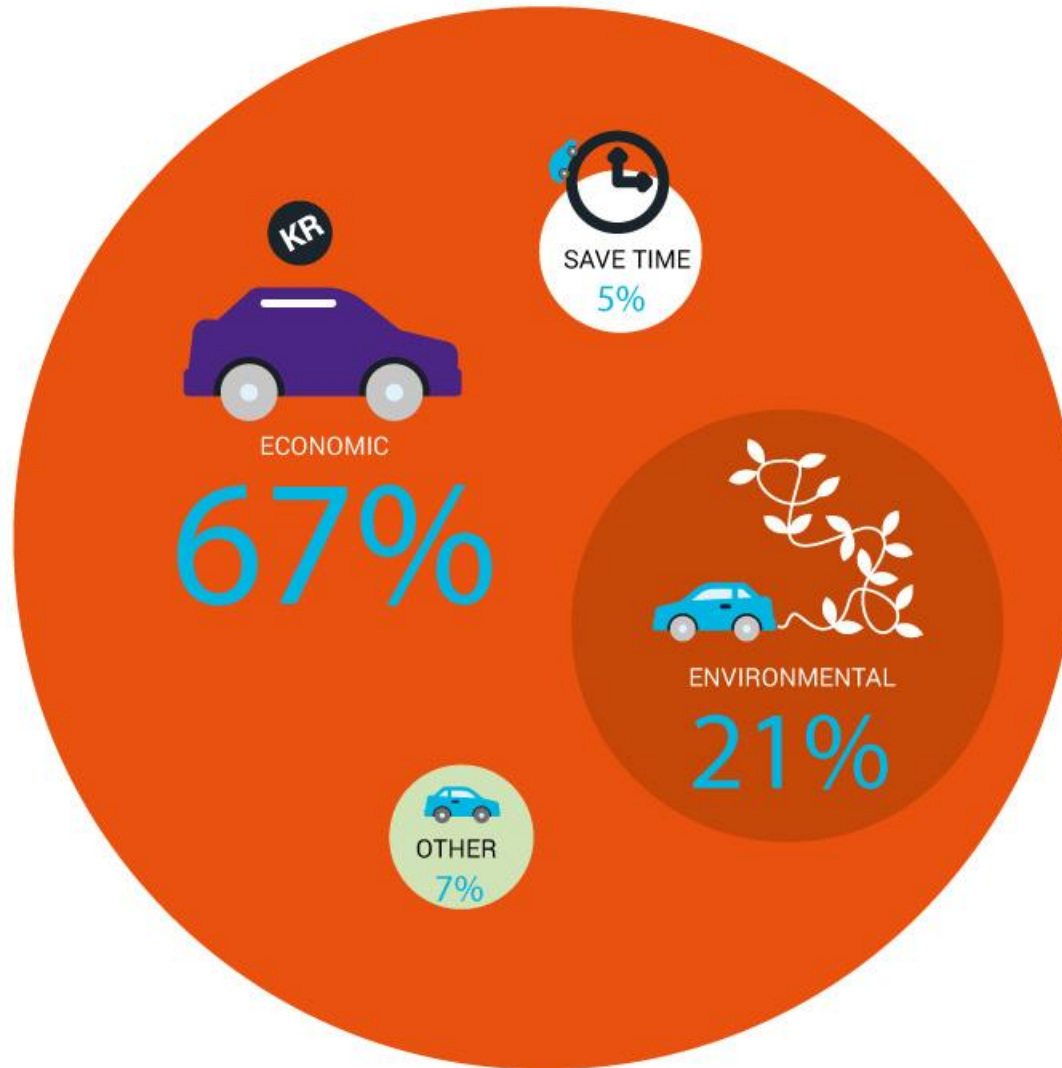


The Norwegian EV owner survey 2016: How satisfied are you as an EV owner?



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Economy is the most important reason to choose an electric car

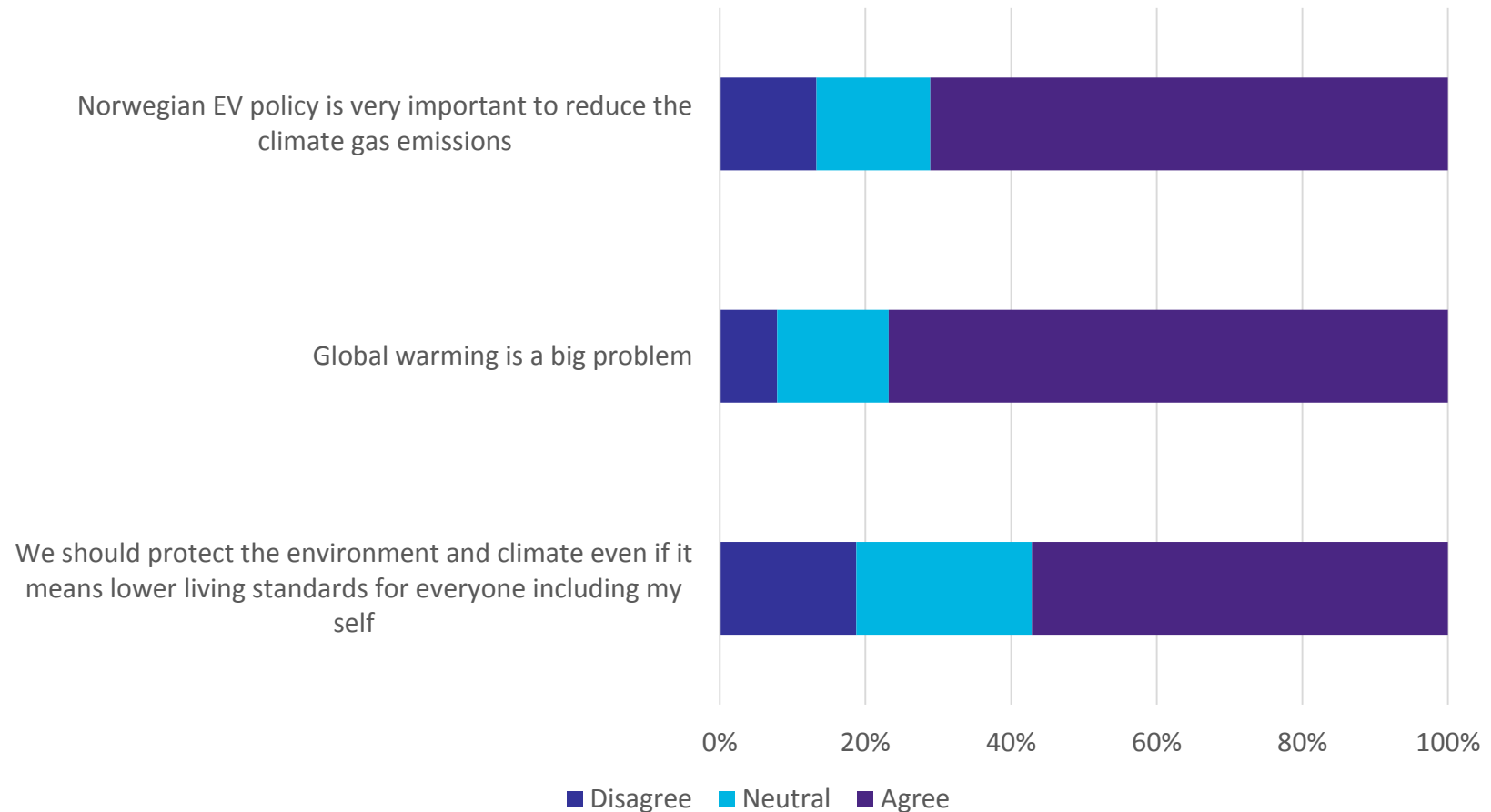


The Norwegian EV owner survey 2016: Most important reason to choose an electric car



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Environmental concern among EV owners

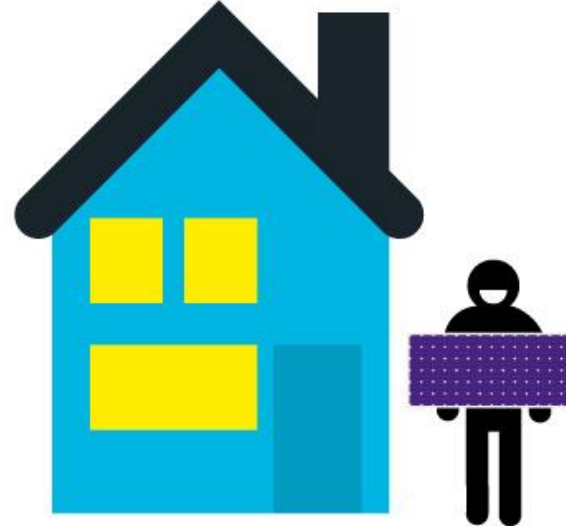


The EV owners are more conscious about their energy use and want to contribute more for the environment



I AM MORE CONSCIOUS ABOUT MY
ENERGY USE AFTER I BOUGHT AN EV

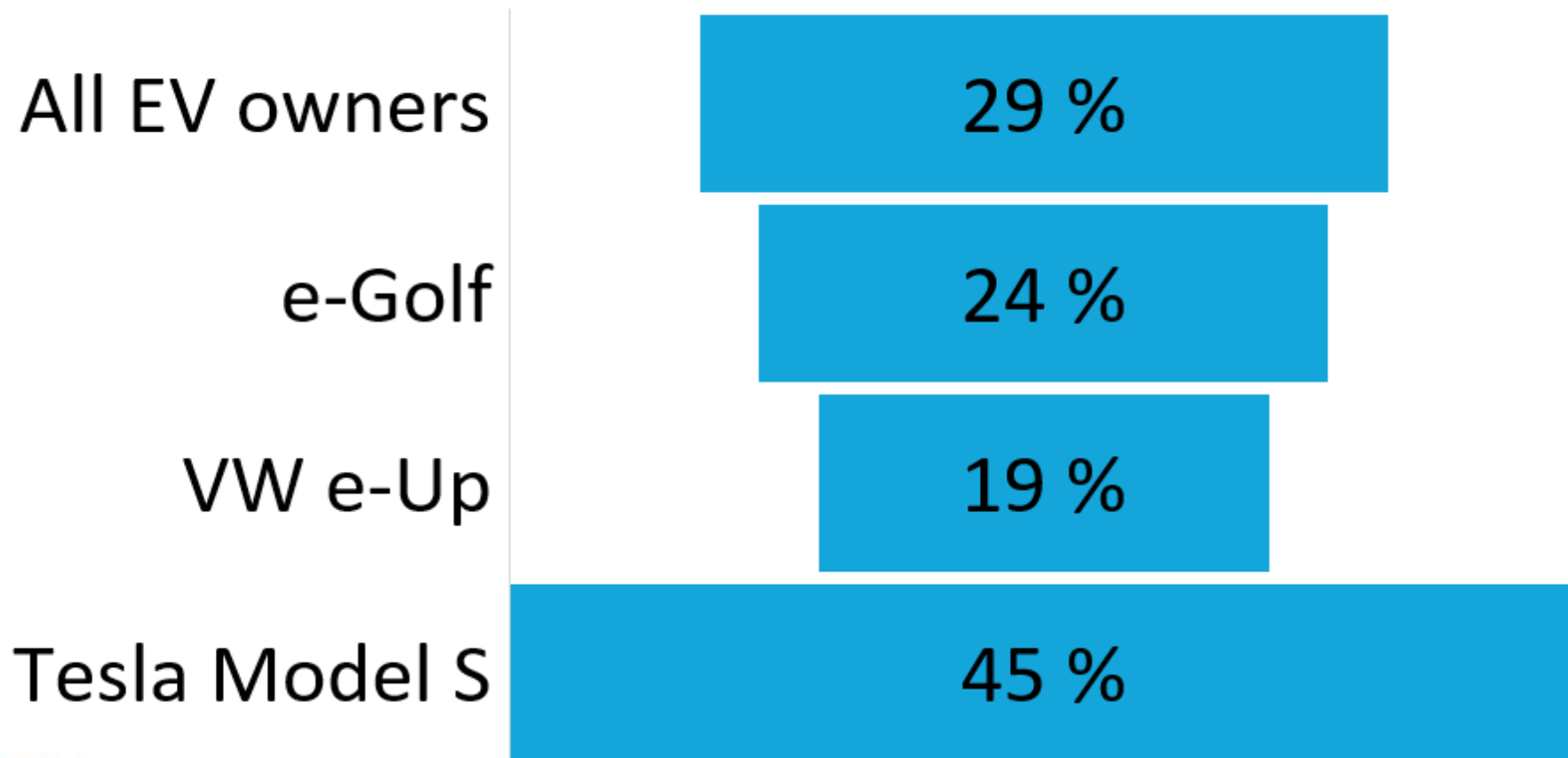
60% AGREE



I CONSIDER INSTALLING
SOLAR PANEL ON MY ROOF

32% AGREE

Only electric car(s) in household



~~Range anxiety~~ → charging anxiety

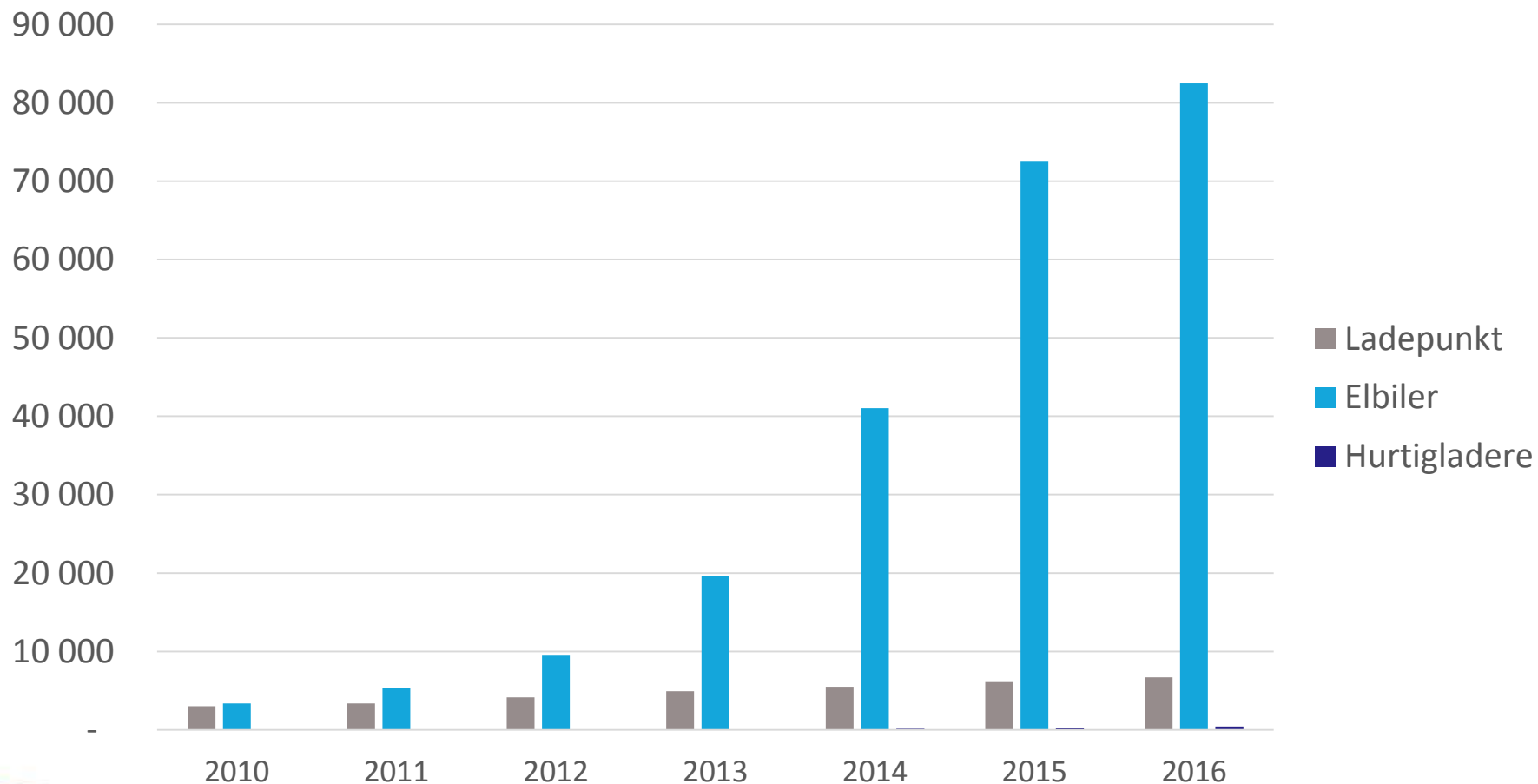
- Range anxiety:
 - new EV-owners
- Charging points:
 - Not enough of them
 - Will they work?
 - Queues



I OFTEN EXPERIENCE
RANGE ANXIETY
22% AGREE



Charging infrastructure lagging behind



New: 2 multistandard charging stations every 50 km on main roads by 2017 (public tender).



From early movers to early mass market

- Incentives speed introduction
 - Helps competitiveness
 - But also eye-opener
- 40% EV share in the county Hordaland



So what's on in Norway?

- Will we stop selling diesel- and petrol cars after 2025?
- Probably...



Vidar Helgesen
@VidarHelgesen



Følg

Bred klima- og energipolitisk offensiv fra samarbeidspartiene gjør en god energimelding enda bedre



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- Statistics and policy: www.eafo.eu
- Norwegian EV Association: www.elbil.no
- [Nordic EV Summit 2017](#) - February 7-8, 2017



Smart electric mobility - creating green jobs

Presented by:

